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Name:	Naming Policy
Policy Number:	11-1002
Origin:	Office of Advancement
Approved:	October 25, 2019
Issuing Authority:	Board of Governors
Responsibility:	Vice-President, Advancement
Effective Date:	October 25, 2019
Related Policies:	Gift Acceptance Policy (11-1001)

1. Purpose

Saint Mary's University welcomes and values contributions in support of its vision and mission. In recognition of these voluntary commitments to Saint Mary's, the University may grant a naming opportunity. This policy sets out the framework for the approval and maintenance of all naming opportunities.

2. Glossary

Academic unit: An organisational component of the University such as a Faculty or School which is responsible for programs or group of courses. This does not refer to the building or space in which the unit is housed.

Charitable donations: A gift of cash or stock resulting in the issuing of a charitable tax receipt from the University.

Honorific naming: the naming of a University entity to honour the distinguished service to the University or society in general by an individual.

Philanthropic naming: the naming of a University entity in recognition of a charitable donation from an individual, foundation or organization.

Sponsorship: A financial transaction to the University whereby the corporate entity receives marketing value for the transaction, or an advantage, which would make it ineligible for a charitable tax receipt.

3. Scope

- 3.1 Naming opportunities will be consistent across all areas of the University and administered by the Office of Advancement (Advancement), which has oversight responsibility for all aspects of the application and management of philanthropic and honorific naming opportunities.
- 3.2 This policy is university-wide and applies to all faculty, staff, students, volunteers and Board of Governors who seek to recognize a contribution with a naming of specific buildings or other physical properties, programs, scholarships, academic units, centres, institutes, faculty positions (ie. chairs, professorships), trees, benches, or other facets of the University.
- 3.3 This policy excludes signage or other forms of recognition associated with sponsorship opportunities.
- 3.4 This policy and associated implementation guidelines are informed by applicable policies and guidance offered by the Canada Revenue Agency for donor recognition.

4. Philanthropic Namings

- 4.1 Representatives of the University may consider discussing naming opportunities with donors as a means of recognizing charitable donations. The following guidelines will determine the situations upon which naming considerations will be approved:
 - Namings may be approved to recognize expendable gifts, endowed gifts, pledges and gifts-in-kind;
 - Namings proposed in recognition of planned gifts (ie. bequests) will be submitted for approval when the philanthropic gift is received.
 - Irrevocable planned gifts where ownership of the asset has been transferred to the University may be eligible for naming opportunities at the time of the transfer of ownership with special approval of the Vice-President, Advancement required;
 - Gifts received that qualify for external matching gift programs may be considered for a naming opportunity equal to the value of the gift plus the matching funds leveraged; and
 - Namings may be approved in the name of the donor or a third party at the request of the donor where the third party or a representative has given consent.
- 4.2 All philanthropic naming opportunities will:
 - enhance the reputation of the University and its standing in the community as an academic institution of high standards and values;
 - conform with the University's commitment to freedom of academic expression, integrity and quality of education and advance the University's mission, without endorsing an ideological position or commercial product and/or service;
 - have been reviewed and agreed upon by the Faculty Dean or Staff Leader that will be responsible for the execution of the donation and/or has oversight of the named space; and
 - have been reviewed and agreed upon by the donor.
- 4.3 When determining values for named spaces, the case for naming will be developed based on the following principles:
 - the opportunities offered should align with the mission and vision of the University;

- planning process and value assignment is completed in advance of offering naming opportunities to donors;
- consideration of the cost of the space (new vs. refurbished) and the fundraising component of the total project cost;
- consideration of size, utility, location of space, visibility;
- exposure to various types and sizes of audiences (students, community members, staff/faculty etc); and
- consideration of gift ranges noted in the Appendix.

4.4 Upon approval, Advancement will administer the implementation of philanthropic naming opportunities in collaboration with the donor, the Faculty or Department implicated and Office of Facilities Management. Advancement will create, maintain and coordinate a university-wide inventory of approved naming opportunities and a matrix of naming levels that fall within the authority of the President.

5. Honorific Namings

5.1 In exceptional circumstances, naming may be approved to honour an individual or organization for distinguished service to the University or society in general. Normally, naming in honour of a member of the Saint Mary's University community will not occur while that person is a regular employee or member of a formal University committee (e.g. Board of Governors, Senate).

5.2 Appropriate criteria for an honorific naming include recognition of exceptional service of lasting value to Saint Mary's University, the broader community or our country;

5.3 Normally, no more than one space may be named honorifically for any one individual.

5.4 Proposed honorific namings requires review and recommendation by the Vice-President, Advancement or designate to ensure that opportunities for significant philanthropic contributions are not eliminated through the honorific naming prior to a submission for formal approval.

5.5 The President will review honorific naming proposals with the Executive Management Group and present them, with their recommendation, to the Executive Committee of the Board of Governors for final approval.

6. Approval of Naming Considerations

6.1 Final approval of a naming opportunity is within the authority of the President & Vice-Chancellor for gifts up to \$2 million where there are no special considerations. Final approval is within the authority of the Board of Governors for gifts \$2 million and above or gifts with special circumstances that warrant additional review. Named academic units, centres and institutes as well as Academic Chairs, Professorships and other academic positions require the additional approval of the Senate.

6.2 Saint Mary's University reserves the right to withdraw a naming opportunity if it constitutes a significant and continuing impairment to the University's reputation or if the agreed-upon

philanthropic contributions are significantly reduced. Withdrawal of a naming opportunity including removal of signage requires approval of the Board of Governors.

- 6.3 No naming will be approved that implies the University's endorsement of a political or ideological position.
- 6.4 Academic units will only be named after individuals.
- 6.5 Namings will be independent of all appointment, admission and curriculum decisions.
- 6.6 No corporate logos or branding elements will be used for philanthropic recognition purposes on naming recognition signage.
- 6.7 Decisions to name will include consultation with appropriate individuals and groups with the University community. Concerns from any member of the Saint Mary's community regarding a philanthropic or honorific naming opportunity may be submitted, in writing, through any Vice-President.

7. Content of Naming Signage

- 7.1 Naming signage will comply with the University brand standards. The size of the signage will vary depending on the named space, but will normally contain the type of naming, the name itself and may have one additional attribute, such as degree information.

8. Duration, Installation and Modification of Namings

- 8.1 No commitment to a naming shall extend beyond the life or existence of the entity named.
- 8.2 Where appropriate, time limitations for naming opportunities may be established with the donor or proponent of the naming proposal and included in a gift agreement.
- 8.3 Normally, installation of signage will only take effect when a minimum of 40% of the gift has been received, with exceptions requiring the approval of the Vice-President, Advancement. If a pledge is in arrears at the time of installation, consultation with the Vice President, Advancement should occur in advance of decision.
- 8.4 Where a physical space has been named, the University will continue to use the name so long as the facility or component remains in use and serves its original function, or until the time that has been agreed upon in the gift agreement. When the use of a facility or component changes substantially prior to the normally anticipated life span of the space as a result of academic restructuring, renovation, demolition or other reasons, the University may retain the use of the name, name another comparable room or facility, or retire the use of the name, with consultation with the donor or donor representative, if possible and appropriate.
- 8.5 If a commemorative tree or bench becomes unsightly due to disease, vandalism, or acts of nature or if a tree or bench needs to be removed or relocated due to unforeseen construction within 10 years of its donation, it will be replaced at no additional cost to the donor. After 10 years, the tree or bench will not be replaced.

- 8.6 The original donor or donor representative may request a change in a naming if the donor (corporate or individual) has changed its name. The University may request that the donor bear any associated expenses with the change, such as a change to signage. Changes to namings must be submitted through the same approval process as for the original naming.

Matrix of Categories & Ranges

Public/Teaching Areas	Minimum Amount/Range
Entire Building	\$5,000,000+
Lecture Theatre	\$250,000 - \$2,000,000
Study Area / Lounge	\$50,000 - \$2,000,000
Teaching Lab (includes e-learning lab)	\$250,000 - \$1,000,000
Suite / Floor	\$250,000 - \$1,000,000
Seminar Room / Classroom	\$100,000 - \$250,000
Conference Room / Boardroom / Meeting Room	\$100,000 – 250,000
Commemorative Bench	\$10,000
Commemorative Tree	\$5,000

Endowment Category	Minimum Amount/Ranges
Chair	<p>\$ 3,000,000 minimum \$5,000,000 preferred</p> <p>If less than \$3 million, it is a 'top up' chair to an existing faculty complement position</p>
Professorship	\$1,000,000 - \$3,000,000
Faculty Fellowship	\$500,000
Lecture Series Fund	\$500,000
Graduate Student Fellowship	\$250,000
Endowed Bursary, Scholarship or Award	\$ 25,000
<i>Annually funded (non-endowed) Bursary, Scholarship or Award</i>	<i>\$5,000 over 5 years minimum</i>

Academic Units	Minimum Amount/Range
Faculty	Senate and Board approval required
School	Senate and Board approval required
Academic Department	\$5,000,000
Centre	\$1 - 5,000,000
Institute	\$1 - 5,000,000